

Document Management

Purpose

Even in today's electronic world, residents come with a lot of paperwork. The document management section allows users to organize this paperwork into the resident's electronic chart for an all-in-one medical record.

Adding Documents

There are two ways to add documents into Document Management. The first is by adding scanned documents. These could include faxes, results, or after visit summaries from resident appointments, as well as reports printed from ECS and physically signed. The second option is to attach reports generated within ECS. You may desire to save a report generated at a specific time or have reports which are signed electronically to add to the chart. Either way, these reports are saved and treated just as if they were physical documents.

Add Scanned Documents

1. Scan the document and save it to a file on your computer.
2. Open ECS and navigate to the Document Management Access screen.
3. Choose the type of document from the available buttons.
4. Click on the maroon heading stating the type of document.
5. In the box that pops up, navigate to the file on your computer that contains the scanned document.
6. Click "Save" or "Sign" to save the document.

Attach Reports from Within ECS

1. Open the report(s) that you want to save.
2. If the report has a signature field, you may use the "Signature" button at the top of the screen to sign it electronically.
3. Then, look for the "Attach" button at the top of the screen.
 - a. If this button is 'active,' then the report has already been setup in the background to save to a specific place. Simply click on the "Attach" button to save the report.
 - b. If the "Attach" button is not active, click to place a check in the box next to the word "Manual." This tells the program that you will manually choose where the report should be saved. Once you have checked the box for "manual," the "Attach" button will become active.
 - i. You will be given the opportunity to save the report on other residents if desired.
 - ii. The topic selection screen will then pop-up, allowing you to choose where to save the report. Choose the "Document Management" section, and then double click on the topic appropriate for your document. Click on the maroon heading word within the topic to select the type of document, and then click "OK."

4. Once you have successfully attached the document, you will see a results pop-up box displaying a list of titles, resident names, and locations of the documents that you saved.
 - a. If you have reports open on more than one resident, using 'attach' will save each report on the correct resident.

Viewing Documents

From Document Management

1. Navigate to the Document Management Access screen
2. Under the 'View' Column, choose "View Documents" to view a screen showing all uploaded documents for the selected resident(s).

From Any View Screen

1. Open a view screen using the green "View" button on the toolbar at the top of the screen.
2. Select "Names" from the top of the screen and choose the appropriate resident(s).
3. Select "Topic" from the top of the screen to open the topic selection box.
4. Click onto the "Document Management" tab from the top of the box.
5. Click onto the topic describing the document(s) that you are looking for and click "OK."

Once You See the List

1. You will see a list of documents or pictures that have been uploaded or attached to that topic for the selected resident(s).
2. Pictures will show up in the list as thumbnails (some older photos may show up full size). Click on the picture to view full size.
3. Documents will show up as a scroll icon with a small blue file button on top. Click on the file button to view the document.



Printing Documents

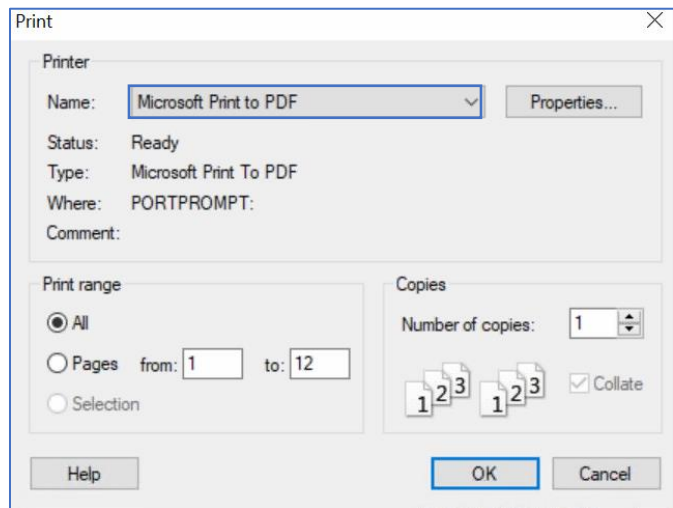
Printing Only the Scanned Document

1. Use the view screen or a view task as above to pull up a preview of the document. Print the document as usual from the preview screen.

Printing the Document when Attached to a Report

1. Scanned documents can be attached to any report in ECS by using report maker.
2. When a report has scanned documents attached, a "Print with Attachments" button will appear at the top of your preview screen.
 - a. Choose "Print with Attachments" to print the report as well as any scanned or uploaded documents that are attached to it.
 - i. A box will appear allowing you to choose the printer, quantity, etc.

- b. If available at your facility, you may also choose “print to PDF” in the drop-down menu on the print page to save the entire document including the report and the attached scanned documents as a .pdf file.
- i. If using “print to PDF,” the report itself will be one document and the attachments will be a separate document, allowing you choose to keep them together, or organize them separately.



Videos

Adding and Viewing Videos to ECS

Video content can be added to ECS in the same way as documents. By following the above process, videos may be saved and viewed right in your ECS Database.